Instruction Guide

EEPM 2.0

ENERGY EFFICIENCY PROGRAM

ONCOR

A dedicated and secure online portal, EEPM 2.0 makes it easier for service providers to participate in Oncor's Energy Efficiency programs.

With enhanced functionalities and an enriched user interface, the portal allows service providers to create and submit projects, and apply for incentives with minimal effort. Portal designed to be responsive for mobile and tablet devices, which enables service providers to enter customer site and measure data directly into EEPM from the customer's premises. The introduction of online e-sign templates for the host customer agreement and income eligibility certificate enables service providers to get documents signed directly from mobile devices – eliminating excessive paperwork.
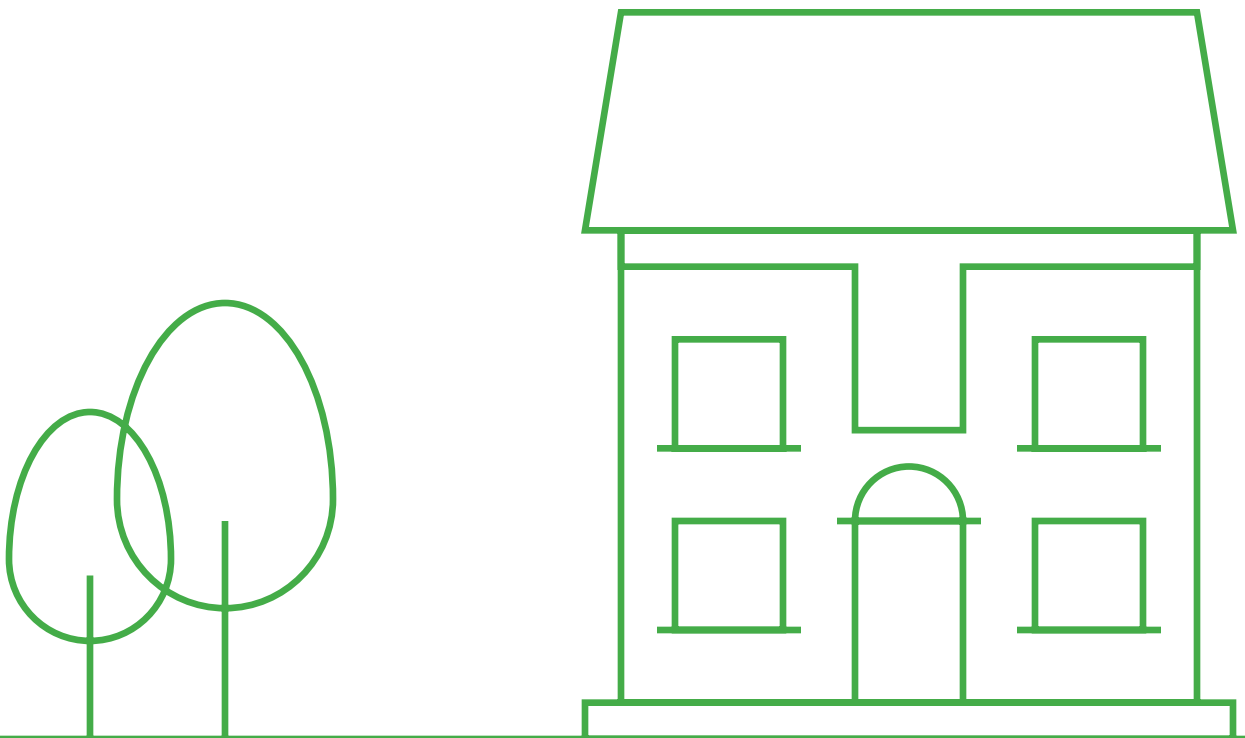
The new and improved process will reduce the time it takes to create and submit projects, and eliminate data entry errors in savings calculations.

Whether you're starting a new project or editing an existing one, this guide covers everything you need to know when you log in to EEPM 2.0.

Program Participation

SERVICE PROVIDER DASHBOARD

EEPM 2.0 features a new dashboard that offers quick and easy access to the information you need most often, including:

- Program options in various stages
  - o Active Programs
  - o Program Applications
  - o Eligible Programs

- Recent project data based on specific categories
  - o Action Required
  - o Recently Viewed Projects
  - o Projects Nearing Completion Date
  - o Recently Viewed Sites

- Insurance expiration highlights

- ESI ID validation

- Incentive calculator

- Training guide link

- Residential forms

PROGRAM OPTION ACTIVITY

Eligible Programs

Eligible Programs indicates the number of programs a service provider is qualified or approved to apply for.
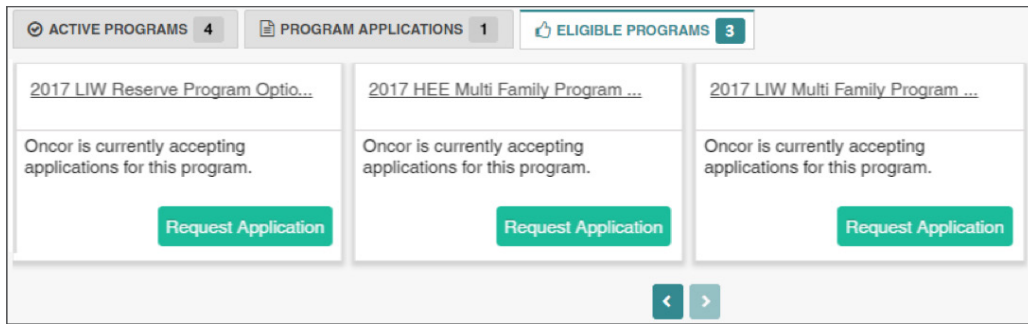
- To view the specific programs, you're eligible for, click on the **Eligible Programs** tab.
 - o   The corresponding programs will appear in a horizontal series.
  - o   If the program you want to apply for is not displayed, email the support desk/project manager.

- Navigate right or left using the arrow keys at the bottom.

- Click on **Request Application** to start the program application process.

- Once the time frame for the program application expires, the **Request Application** button will be disabled and service providers will no longer be able to apply.

Program Applications

Before you begin the Program Application process you must have your insurance agent submit valid insurance forms (auto, general liability and workers comp) to eepminsurance@oncor.com.

Program Applications will appear with the "Open" status as shown in the image below.
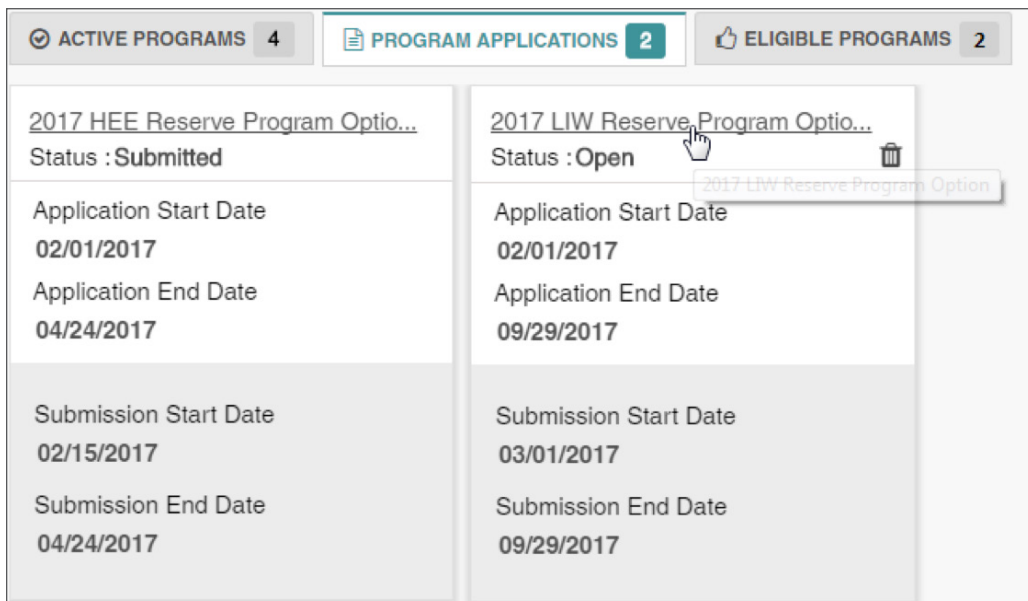
- Click on the **Program Option** link as shown in the above image to view the **Program Applications** screen.

- The **Program Applications** screen will appear.

1. Check the box at the top right to have your company's name added to the Oncor/TALOT website for customers.

2. Select (check the appropriate boxes) for **Measures I can install**.

3. **Areas that I serve** can be selected in two ways:

    3a. Import the county list from previously submitted applications by selecting the appropriate item from the drop-down menu.

    3b. Select the county manually. Based on the county chosen, the corresponding cities and zip codes will be automatically selected. You can uncheck any cities and zip codes that you do not serve.

4. Upload mandatory **Documents** such as:
    o   Program Addendum
    o   Financial References

5. Click on **Submit Application**.

After you submit the program application, an Oncor program manager will review your submission. Once the review is completed, you'll receive an email notifying you of the decision on your application. If your application is approved, you'll have access to the program in the **Active Programs** list as shown below.

If your application is denied by the program manager, it will be listed in the **Program Applications** tab with a "Rejected" status. You would then need to correct any inaccurate or missing data and resubmit the application for review.
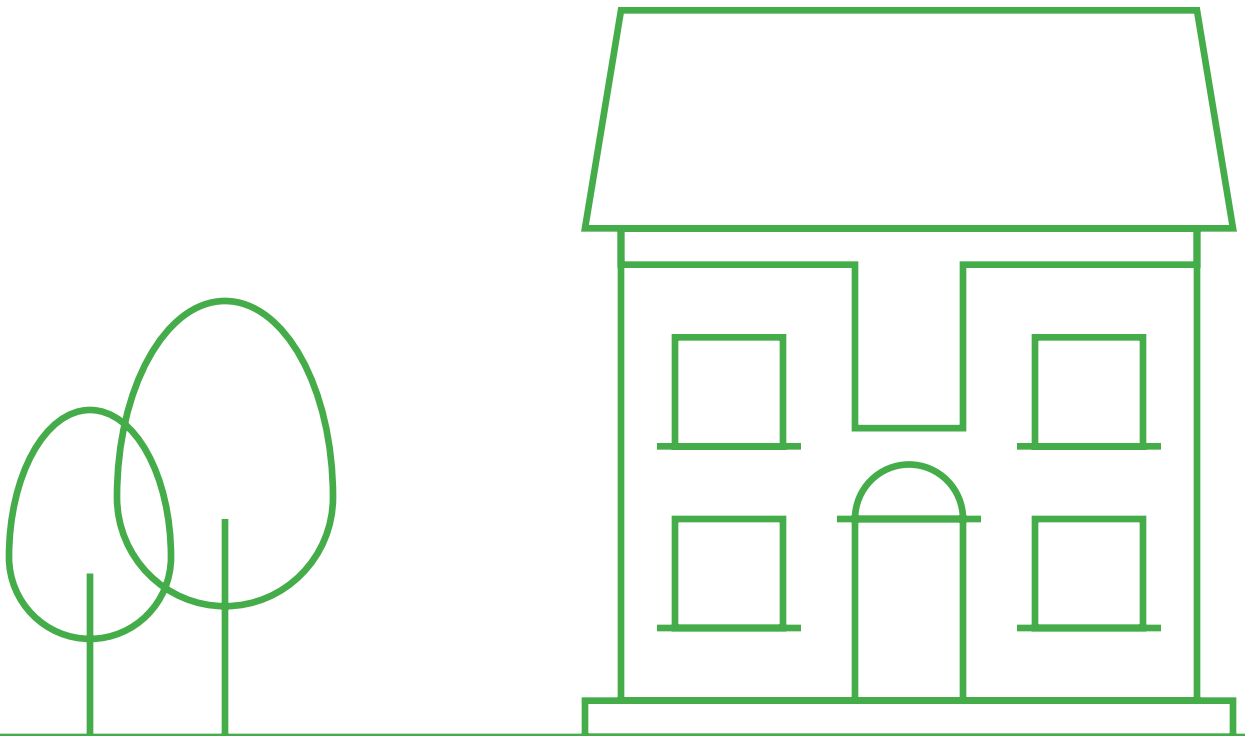
Applications can also be viewed from the **My Applications** tab, which displays a list of each program application and its corresponding status, as shown below.

Application Number	Program option	Program year	Status	Approval Date
POA_17BCSOP - 2017 - 12766	2017 Basic Commercial Standard Offer Program	2017	Approved	05/12/2017
POA_17LIWMF - 2017 - 12755	2017 LIW Multi Family Program Option	2017	Approved	05/12/2017
POA_17HEER - 2017 - 12757	2017 HEE Reserve Program Option	2017	Approved	05/06/2017
POA_17LIWR - 2017 - 12756	2017 LIW Reserve Program Option	2017	Approved	05/06/2017
POA_17SSPVCO - 2017 - 12753	2017 Commercial Solar Program Option	2017	Approved	05/05/2017
POA_17SPVRES - 2017 - 11719	2017 Residential Solar Program Option	2017	Approved	05/05/2017
POA_17CCSOP - 2017 - 12758	2017 Custom Commercial Standard Offer Program	2017	Rejected	-
POA_17HEEMF - 2017 - 12765	2017 HEE Multi Family Program Option	2017	Open	-

Creating a Customer Site List

Add Site Information

Service providers must create a customer site list before starting a residential project. Otherwise, projects cannot be created and submitted as project customer screen expects site list to be added which actually comes from different section of the application called customer site list screen.

1. From the main menu, click on **Open Customers**.

2. Select the program and input either the last seven-digits of your ESI ID or your full nine-digit meter number and include the LG after (xxxxxxxxxLG).

3. Click **Get Info**, and then the customer site form will appear with auto-populated customer data.

4. The **Service Provider Project Contact Information** section will be auto-filled.

5. The **Service Provider Inspection Contact Information** section can be filled by selecting the existing template from the drop-down menu. To create a new template for the inspection contact after the information is filled in, select the option to **Save as** template and provide the **Template Name**.

6. Click **Save**. The system will automatically navigate to the next screen where service providers can add measures to the site

Add site documents

Residential programs require mandatory documents like the host customer agreement and income eligibility certificate to be submitted for each customer site added. The document can be attached in two ways:

- Online signing through mobile/tablet/laptop

- Offline signing using PDF templates

Steps for Online Signing

- Click on the orange "Add/View Image" 🖼 icon at the top right of the page.

- Click on the **Host Customer Agreement Form** to open the e-signature template.

- The template will open up with the service provider and customer data already populated. Fill in the additional data in the respective fields.

- Get the customer sign in the signature area and sign your name in the service provider area.

- Click on the **Attach as PDF** button. The system saves the completed form as a PDF and attaches it to the site.

- If any corrections are required in the attached PDF, delete the signed document and repeat the above steps.

CUSTOMER SITE LIST ☰ Customer List

2017 HEE Reserve Program Option Program Option Name	Johnny English Customer Name	9998867 ESI ID	Back To Attachment List

ONCOR. **Home Energy Efficiency Standard Offer Program**
Host Customer Agreement and Certificate

Service Provider Information

Company Name	:	SVP Energy Holding LLC
Company Contact Name	:	Justin Lantern
Address	:	45th Street
City, State, Zip	:	Plano, Texas, 75001-4567
Company Phone	:	(657) 567-8876
Email	:	user@mail.com

This Agreement must be signed by each party prior to commencement of the project (as defined below)

I. General Information

Program Option : ✔ Reserve ☐ Multifamily ☐ HVAC   Host Customer is : ☐ Owner ✔ Renter

Host Customer information :

Host Customer Name	Contact person	Host customer email (Optional)
Johnny English	Johnny English	user1@mail.com

Phone Number	Alternate Number	Best time to call
(111) 111-1111	(111) 111-1111	5 PM

Signature association with Host customer: (If different)	If Host customer is Renter was owner notified ⦿ Yes ◯ No	Owner Name

Project Site Information :

Oncor Electric Delivery ESIID	Site Address	Apt#	City
1111111	405 HIGHLAND VIEW DR PERM		WYLIE

ZIP	County	Install date	In-site installers	Home Type
75098-5103	COLLIN	10/10/2017 📅		✔ Single Family ☐ Multifamily ☐ Mobile Home

Heating Type	No. of stories	No. of Bedrooms
✔ Electric ☐ Heat Pump ☐ Gas	2	4

No. of Occupants	Shielding	Total Conditioned ft (Measured)
5	☐ Exposed ✔ Normal ☐ Well Shielded	1545

II. Host Customer and Service Provider Acknowledgements

SVP Energy Holding LLC ("Service Provider") intends to install energy efficiency measures at facilities owned and/or operated by Johnny English ("Host Customer") at the address(es) ("Project Site(s)") listed above (such installation at the Project Sites(s) being the "Project"). The Service Provider is implementing the Project as part of the Home Energy Efficiency Standard Offer Program(the "HEE SOP") offered by Oncor Electric Delivery Company LLC ("Oncor"). In consideration of participation in HEESOP, and for other good and valuable consideration, the receipt, adequacy and legal sufficiency of which are hereby acknowledged, Service Provider and Host Customer agree as follows.

III. Host Customer Agreements

A. Host Customer agrees, upon three (3) days prior notice (which may be written, electronic or verbal), to provide Oncor, the Service Provider and any independent measurement and verification person selected by the Public Utility Commission of Texas with full and complete access to the Project Site for any purpose related to, or arising from the HEESOP. The right of access will be subject to the Host Customer's reasonable access requirements and, unless otherwise agreed, should occur during convenient hours of the Host Customer.

VIOLATION OF ANY LOCAL, STATE, OR FEDERAL LAW OR REGULATION INCLUDING, BUT NOT LIMITED TO, ENVIRONMENTAL AND HEALTH AND SAFETY LAWS OR REGULATIONS; 4) STRICT LIABILITY IMPOSED BY ANY LAW OR REGULATION; 5) EQUIPMENT MALFUNCTIONS; OR 6) ENERGY SAVINGS SHORTFALLS OF THE PROJECT; AND FURTHER, IT IS THE EXPRESS INTENT OF THE PARTIES THAT, FOR THE PURPOSES OF ANY SUCH CLAIMS RELATING TO THE INJURY OF DEATH OF PERSONS, SUCH CLAIMS, AND CUSTOMER'S OBLIGATIONS TO DEFEND, PROTECT, INDEMNIFY, AND HOLD HARMLESS, WILL INCLUDE, BUT NOT BE LIMITED TO, CLAIMS ARISING OUT OF OR RESULTING FROM ONCOR GROUP'S SOLE OR CONCURRENT (1) NEGLIGENCE, (2) STRICT LIABILITY, OR (3) OTHER FAULT OF ANY NATURE. I hereby warrant and represent that the listed measures have been installed at the Project Site on the date indicated. I attest with my signature that the measure(s) listed will not be reported in any other program where the energy savings from such measure(s) will be reported to the state of Texas. This can include, but not be limited to, other programs sponsored by Oncor, federal or state governments/agencies, the Electric Reliability Council of Texas (ERCOT), or other utilities.

SERVICE PROVIDER SIGNATURE Sign Below	HOST CUSTOMER SIGNATURE Sign Below
Justin	*Johnny*
Clear	Clear

Name/Title	Name/Title
Justin Lantern	Johnny English

Company if applicable	Company if applicable
SVP Energy Holding LLC	

Date	Date
10/10/2017 📅	10/10/2017 📅

Attach as PDF

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Signed Host Customer Agreement attached as PDF

Steps for Offline Signing

- Download the PDF templates from the home page, located in the Residential Forms section at the bottom of the page.

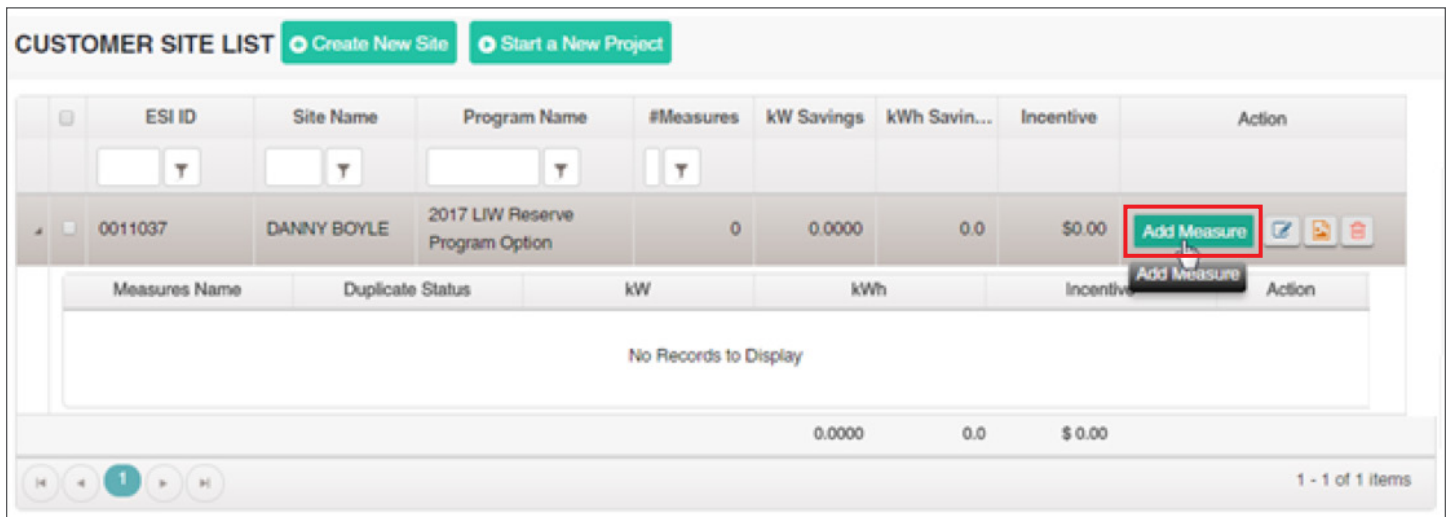- Open the PDF and fill in the service provider and customer data.

Use the Adobe PDF Reader's sign feature to either draw, type or upload your signature in the PDF document. Another option is to print the document, sign it and scan it.
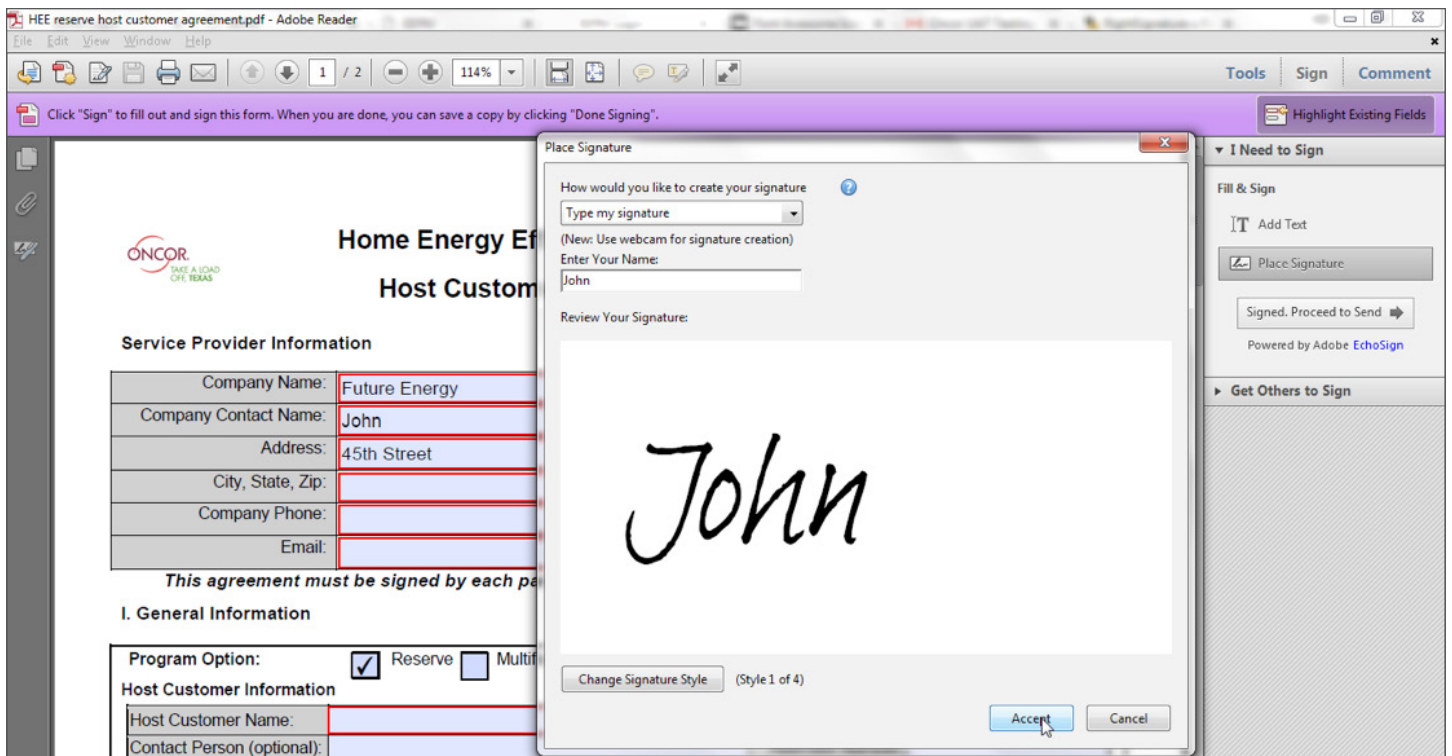
- Save the signed PDF and log in to the portal to upload the document in the **Add/View Images** section.

Add Measures

- Click on the **Add Measure** button at the top right of the screen and select the appropriate measure from the drop-down menu.

- Once the measure is selected, the system will request measure inputs. Fill in all of the required fields.

- Click on the **Save** button. The system will calculate the kW & kWh savings and the incentive amount for the added measure.

Once the measure has been added successfully, the system will navigate to the customer site list screen where you'll see the site and measures that were added.

- Repeat the steps above to add more measures to the same site.

- Added measure(s) will be displayed in a grid format as shown above.

Edit Site & Measure

- To edit the site/measure information, click on the **Edit** button in the grid.

- To delete a site/measure, click on the "trash can" icon

- Click on the "image" icon to add/view site/measure images.

		0011037	DANNY BOYLE	2017 LIW Reserve Program Option	1	1.4760	2,700.0	$886.98	Add Measure			
	Measures Name		Duplicate Status		kW		kWh		Incentive		Action	
	Ceiling Insulation		Duplicate(s) Found		1.4760		2,700.0		$886.98			
						1.4760	2,700.0	$ 886.98	Edit Measure			

Site & Measure Information in Customer Site List Screen

CUSTOMER SITE LIST   ⊕ Create New Site   ⊕ Start a New Project

|		ESI ID	Site Name	Program Name	#Measures	kW Savings	kWh Savi...	Incentive	Action		
		▼	▼		▼						
◢		0011038	TONY STARK	2017 LIW Reserve Program Option	1	2.8302	4,750.7	$2,142.71	Add Measure		
	Measures Name		Duplicate Status		kW		kWh		Incentive		Action
	Wall Insulation		Duplicate(s) Found		2.8302		4,750.7		$2,142.71		
◢		0011037	DANNY BOYLE	2017 LIW Reserve Program Option	2	1.5161	2,786.6	$917.04	Add Measure		
	Measures Name		Duplicate Status		kW		kWh		Incentive		Action
	Ceiling Insulation		Duplicate(s) Found		1.4760		2,700.0		$886.98		
	Aerators		No Duplicate Exists		0.0401		86.6		$30.06		
						4.3463	7,537.3	$ 3,059.75			

|◄ ◄ **1** ► ►| 1 - 2 of 2 items

Repeat the steps mentioned above to add multiple sites and measures. The **Customer Site List** screen will display site and measure data such as measure counts, kW and kWh savings, and incentive amounts.
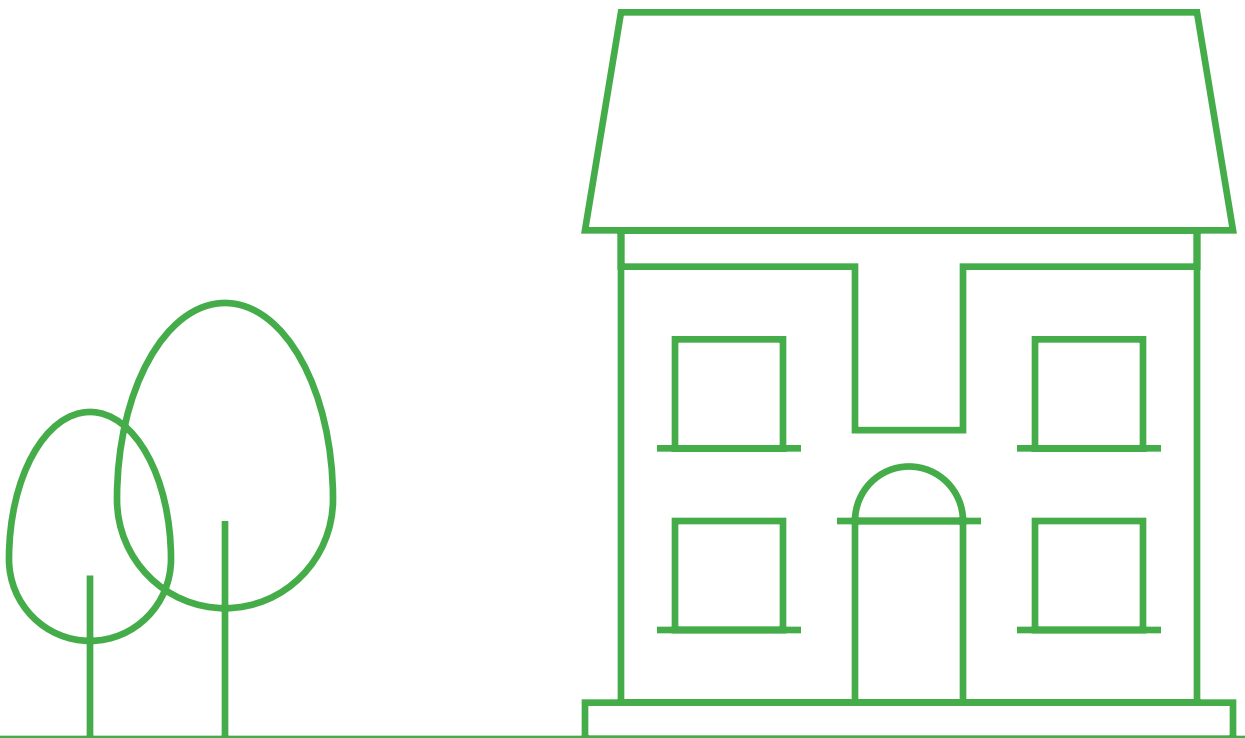
Starting a New Residential Project

Starting a new residential project is simple in EEPM 2.0. The project can be created directly from the **Customer Site List** screen or from **My Projects** by clicking the **Start a New Project** button.

My Projects

The **My Projects** screen includes options to **Start a New Project** and view **Historical Projects** (projects from the previous program year). The table will list all projects with details such as the project code, status and incentive amount.

Action Buttons

	View: To view a project you've submitted, start with the **My Projects** table. Use the filter options available in the column headers to refine your search. Then, click the "eye" icon in the **Action** column. The row color will change to dark gray.
	Edit: To edit your open projects, click on the "pen and paper" icon in the **Action** column.
	Delete: To permanently delete a project, click on the "trash can" icon in the **Action** column.

Start a New Project

- Click on **Start a New Project** from the **My Projects** tab or **Open Customers** tab.

- The system will navigate to the **Start a New Project** screen as shown below.

- Select the program option from the **Select Program** drop-down menu.

- Enter the **Project Nam**e.

- Click on **Save & Continue** to save the project. The system will navigate to the next tab.

- To discard the project, click on **Cancel**.

Close Customers

Sites in the project can be closed in two ways:

o Close the sites created from the **Close Customers** tab within the project as shown below. Select the required sites and click **Close to PR**. The system will navigate to the next tab and the selected sites will appear in the **Customers & Measures** tab.

o Close the customers from the **Customer Site List** screen as shown below. Select the sites from the grid and click the **Close to PR** button. The selected sites will be moved to the **Customer & Measures** tab of an open project, which should be created prior to doing this action.

If there is no site information listed in the site grid, add the site and measures information by following the steps described earlier.

Open Customers $\longrightarrow$ Create New Site $\longrightarrow$ Add Measures

Customers & Measures

Sites which are closed to the projects will be displayed under this tab. At this stage, to remove the sites from the project, select the sites and click the **Exclude** button. This action will remove the closed sites from the current project and the site will be available in the **Close Customers** tab.

After adding all of the required sites, click **Save & Continue** to navigate to the **Upload Documents** tab.

Upload Documents

In the **Upload Documents** tab, the service provider must e-sign and submit the production summary report.

- Click on the "PR Summary" link. The system will open the report with customer data and project savings.

- Draw the signature on the canvas and click **Attach as PDF**. The signed report will be attached as a PDF in the service provider (SP) attachments column.

| 1 START A NEW PROJECT | 2 CLOSE CUSTOMERS | 3 CUSTOMERS & MEASURES | 4 UPLOAD DOCUMENTS | 5 REVIEW & SUBMIT |

| 2017 LIW Test Project | 17LIWR - 2017 - 59301 | IN Open ▾ | Back To Attachment List |
| Project Name | Project Code | Status | |

PRODUCTION REPORT

Project Service Provider Information

Service Provider	Contact	Street Address	City, State, Zip	Phone	E-Mail
NRG Savers	Thassa	500 East Arapaho Rd. #205,	Richardson, Texas, 75081	(214) 597-5119	thassab@hotmail.com

Project Summary Information

Production Report Number	Production Report Name	Production Report Status	Submitted Date
17LIWR - 2017 - 59301	Dev Test project	IN Open	null

Installation Summary

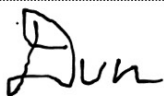| Premise Type	# of Installation	Requested kW	Requested kWh	Requested Incentive	Adjusted kW	Adjusted kWh	Adjusted Incentive
Single Family	15	14.3265	25573.2	8433.68	14.3265	25573.2	8433.68
Total	15	14.3265	25573.2	8433.68	14.3265	25573.2	8433.68

Customer Site Information

Customer Name	ESIID	# of Measure	Requested Savings (kW)	Requested Savings (kWh)	Requested Incentive	Adjusted kW	Adjusted kWh	Adjusted Incentive
David Williams	4377741	2	1.9607	3602.4	1178.91	1.9607	3602.4	1178.91
James Steele	4377834	2	1.8911	3474.4	1137.05	1.8911	3474.4	1137.05
LaBreshia Orr	7597404	2	2.7395	4309.2	1472.19	2.7395	4309.2	1472.19

Customer Site Measure Information

Customer Name	ESIID	Premise Type	Phone Number	Completed Date	Measure	Requested Savings (kW)	Requested Savings (kWh)	Requested Incentive	Adjusted Savings (kW)	Adjusted Savings (kWh)	Adjusted Incentive
David Williams	4377741	Single Family	(817) 212-9685	Oct 10, 2017	Ceiling Insulation	1.6458	3026.4	989.68	1.6458	3026.4	989.68
David Williams	4377741	Single Family	(817) 212-9685	Oct 10, 2017	Ceiling Insulation	0.3149	576	189.23	0.3149	576	189.23
James Steele	4377834	Single Family	(817) 808-4851	Oct 10, 2017	Ceiling Insulation	0.3149	576	189.23	0.3149	576	189.23
James Steele	4377834	Single Family	(817) 808-4851	Oct 10, 2017	Ceiling Insulation	1.5762	2898.4	947.82	1.5762	2898.4	947.82
LaBreshia Orr	7597404	Single Family	(817) 495-2608	Oct 10, 2017	Air Infiltration	0.9575	1049.4	294.23	0.9575	1049.4	294.23

This form has been checked by the Project Service Provider, and all information is true and accurate.

SERVICE PROVIDER SIGNATURE
Sign Below

[signature: Don]

Clear

Name/Title
Don Cook

Date
10/10/2017

Attach as PDF

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• Click **Save & Continue** to move to the next tab.

Review & Submit

The **Review & Submit** page allows service providers to review all of the entered information from the **Start a New Project** and **Upload Documents** tabs. Review all information for accuracy before submitting the project.

The **Submit Project** button sends the project to the Oncor program manager's queue. Once the project is submitted successfully, the status will immediately change from "IN Open" to "IN Submitted." The system will redirect to the **My Projects** page, and the project will be listed as "IN Submitted" in the dashboard.
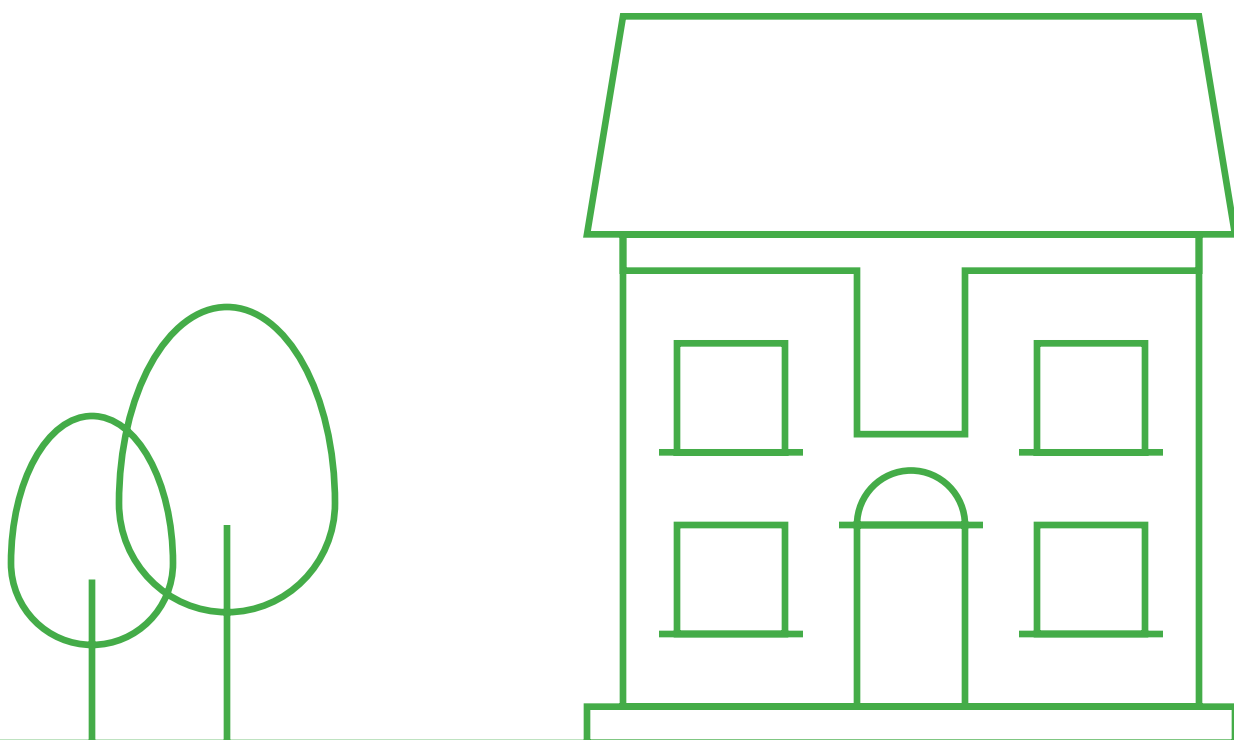
As the project progresses through each stage, users will receive email notifications indicating the status of the project.

1. Review all attached documents

2. Enter **Anti-Spam** code

3. Click **Submit**

Editing a Project

There are two ways to edit a project:

- Filter and browse **Recently Viewed Projects**.

- Search from the list in the **My Projects** table.

Recently Viewed Projects

The **Recently Viewed Projects** tab, located in the service provider dashboard menu, lists all recently viewed projects.

- Filter the project by status under the **Status** column header.

- Review the **Project Name** (first column) and **Project Code** (second column) for a specific project.

- Click on the **Project Code** hyperlink to view and edit the project.

My Projects

From the main menu, click on **My Project**s, located in the service provider dashboard menu.

- Search for the project using the **Project Name** or **Project Code** filters.

- Click on the corresponding icons under the **Action** column to view and edit the project.

Request for Duplicate Approval

Service providers are not allowed to submit the project if the measure added under the site is duplicated. Duplicate measures must be approved by the Oncor program manager prior to project submission.

To send the measure duplicate approval request:

1. Navigate to **Request Duplicate Approval** from the main menu.
2. Select the site which has duplicate measure.
3. Enter the comment.
4. Click **Request Duplicate Approval** button. The request will be sent to the program manager for approval.
5. Click on **Measure History** to view complete details of the previously submitted measure.

Oncor Program manager reviews the request for duplicate measure and approves/rejects it. Service provider will be notified via email and then can proceed to submit the project.

Thank you

for participating in Oncor's
Energy Efficiency programs.
If you have questions, please email
us at **support@oncoreepm.com**.